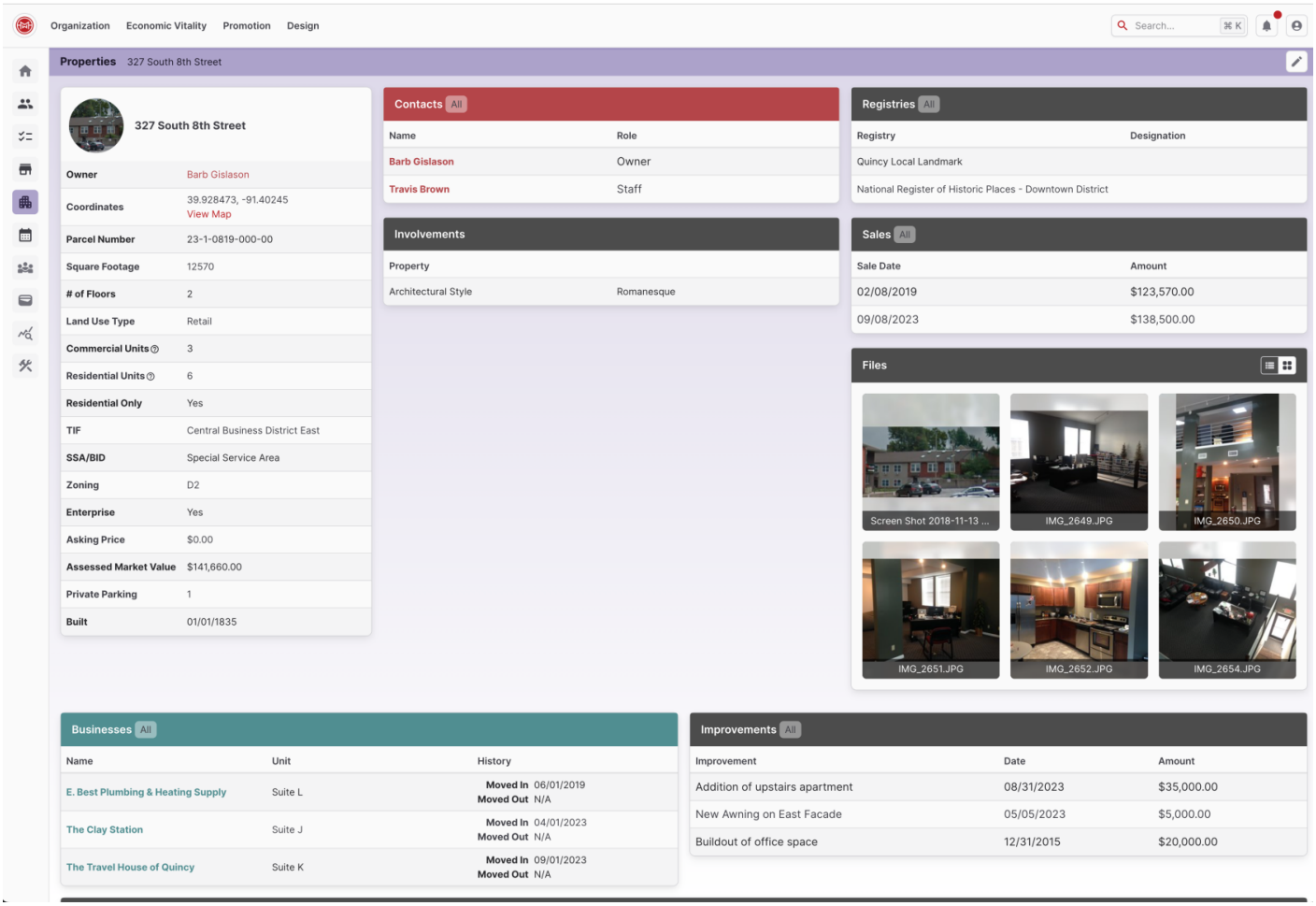
1.05 Properties

- Property Profiles
- Involvements

Property Profiles

To add a property profile, go into the Contacts section of Maestro and click on the Plus button in the upper right hand corner. This will create a blank profile for you to edit and save.



Required Field

Address is the Required Field.

All property profiles must have an address to be saved. The full Address is the unique identifier for properties and will determine if imports update the record or create a new record.

Parcel Numbers vs. Addresses

Maestro identifies a property using its address. However, some organizations use parcel number as the property identifier. The parcel number can be used to search a property from the Search field. Important Note: The parcel number is not a Maestro-required field. And, at this time, advanced searches cannot be run by parcel number. However, the parcel number is included on all exported advanced search results.

Units List

Each property profile contains a Units section. This would be any suite or subsection of the property. For instance, there may be a property that has multiple storefront addresses, each of those would be a separate unit. (i.e. 123 Main, 125 Main, 127 Main may all be in the same building).

Public Parks & Public Parking

These properties are tracked under the Tools module under Community Investment. Most of these properties have known addresses and parcel numbers which are listed under this section. Properties tracked here (under Community Investment) are not pulled into any search results.

If a particular property address or parcel number is not found under the Properties module, users should manually search the Community Investment section to avoid duplication.

Private Parking, Vacant Lots

These properties have profiles in the Properties module. We suggest adding an involvement tag such as: “Privately Owned Parking Lots or Decks” or “Lots (Vacant)”.

Involvements

Involvements are Maestro’s tagging system. It may be helpful to think about Involvements as custom fields or tags. Involvements can be created for any attribute that the organization wants to track. Involvements are the way to get data out of multiple spreadsheets and into one usable system to see each contact, business, or
property’s complete engagement with the organization. Involvements can be added to any property, contact, work plan or business.

Involvements	
Sponsorships	
Blues in the District Note Partner	2015
Blues in the District Note Partner	2021
Blues in the District Note Partner	2024
Blues in the District Note Partner	2014
Blues in the District Corporate Partner	2023
Blues in the District Concert Partner	2022
Volunteer	
Promotion Committee	2019
Organization Committee Chair	2024
Foundation Board	2020
Foundation Board	2019

This feature is used to track items such as:

- Board of Directors
- Committee Roles
- Sponsorships
- Awards
- Attendance, etc.

Important Note: Involvements are used to track important information that needs to be searched and does not have a designated field. For reference, review the full list of involvements and umbrella involvement categories in the Tools module.

Involvement Categories

Having your involvement categories and your initial involvements created prior to loading data will make attaching those involvements much easier. It is important to have a planned naming structure for your involvements so that you can keep track of them down the road. Please see the section on involvements for specifics.

Search & Reporting

Involvement names and data can be searched from the Search field and from the Advanced Reporting tool. However, the Involvement notes cannot be searched. The Involvement Data field is an open text field, so it can be used for dates as well as any other data a user wishes to search later.

Board Terms & Other Multi-Year Involvements

Some involvements require more detailed information, like dates and positions held. Typically, this issue is most related to boards of director positions (district boards, school boards, city council, etc.). In these cases, use the data field to designate the year or term end date. Use the notes field to designate the position held.

For instance, if a board member is serving a three year appointment, each year would be entered as its own involvement:

- Involvement Name: “Board of Directors”
  - Involvement Data: 2018
  - Involvement Notes:
- Involvement Name: “Board of Directors”
  - Involvement Data: 2019
  - Involvement Notes: Vice President
- Involvement Name: “Board of Directors”
  - Involvement Data: 2020
  - Involvement Notes: President

It is recommended that, at the start of a board member’s appointment or office term, all the related involvements (one for each year) be added. This avoids the likely scenario that the data will not be added annually in a timely manner. This process may require regular maintenance--for instance, if a member’s term ends prematurely or if a director is elected to an office position after his/her first year.

Dating Involvements

It is best practice to utilize the data field to include dates, as shown in the examples above.
A common exception to this would be memberships that use a rolling calendar. For example, if you have a membership campaign and someone can join in June and be a member through May of the following year. In this circumstance, we do advise dating your involvement.

- Involvement Name: "2024/2025 Membership"

- Involvement Data: June (or month they join)
- Involvement Note:

This structure will allow you to generate reports for membership renewals quickly and easily.